

THIS IS A DRAFT OF THE ITS-BISS EVALUATION FACTORS, SUBJECT TO CHANGE UPON FURTHER REVIEW AND APPROVAL

EVALUATION FACTORS

ITS-BISS ACQUISITION

1.0 BASIS OF AWARD

The Government will award a contract to the responsible Offeror whose proposal is the most advantageous to the Government, price and other factors considered. The Government will select the "best value" using the factors listed below. The best value is defined as the offer that results in the most advantageous acquisition for the Government. This analysis will be performed through an integrated assessment and trade-off analysis between non-cost/price factors (e.g., Technical, Management, Past Performance, Small Business Subcontracting Factors) and the Cost/Price Factor.

1. Technical Factor

- Technical Solution
- Technical Approach

2. Management Factor

- Personnel
- Management Plans

3. Past Performance Factor

4. Small Business Subcontracting [Full & Open only]

5. Cost/Price Factor

- Cost/Price Realism
- Cost/Price Completeness
- Cost/Price Reasonableness

The Technical and Management Factors are most important; and Past Performance is less important than Technical and Management, but more important than Cost/Price. The Technical, Management, Past Performance, and Small Business Subcontracting Factors are more important than the Cost/Price Factor. Cost/Price is not a rated/scored Evaluation Factor. The Subfactors within each Factor are of equal importance.

2.0 EVALUATION TRADE-OFF PROCESS: BEST VALUE

The Government reserves the right to award to other than the Offeror with the lowest price proposal. Award may not necessarily be made to the lowest price offer. If non-price factors are evaluated as comparatively equal between two or more Offerors, price may become a determining factor. To determine whether a technically superior, higher price offer is the best value, the Government will consider qualitative discriminators that are consistent with the order of importance of the Evaluation Factors and Subfactors.

3.0 EVALUATION FACTORS/SUBFACTORS FOR AWARD

The primary five Evaluation Factors are comprised of various Subfactors and elements, all of which are of equal value.

3.1 FACTOR 1: TECHNICAL

The Technical Factor is comprised of 2 Subfactors as described below.

3.1.1 Subfactor 1 - Technical Solution

The Offeror will be evaluated on how well it has developed and proposed a Statement of Work (SOW) that converts EPA's objectives, functions, assumptions, considerations and constraints into a specific and detailed solution, as well as a step-by-step process for performance under the contract. Some aspects of the Technical Solution which will be evaluated include, but are not limited to:

- Accuracy, clarity, completeness, reasonableness, credibility of the Offeror's proposed Technical Solution and its SOW and its coverage of all Program Objectives in the SOO;
- Offeror's gap analysis with regard to the "As-Is" ITM program and the current industry best practices across the functional areas of the SOO;
- Processes and capabilities the Offeror proposes to close the perceived gap; and
- Offeror's demonstration of its understanding of how to maintain a best practices/leadership business model and how IT/IM can support the Agency's mission in the current Federal ITM environment.

3.1.2 Subfactor 2 – Technical Approach

Offerors will be evaluated on how their proposed solutions and concepts meet the project's objectives, use commercial best practices, are compliant with industry and Government standards, are compliant with EPA's Enterprise Architecture, and provide the results and outputs needed by OEI's customers and other external entities. Some aspects of the Technical Approach which will be evaluated include, but are not limited to:

- Accuracy, clarity, completeness, reasonableness, credibility of the Offeror's proposed Technical Approach;
- Accomplishing the Program Objectives in a systematic way, with particular emphasis on the strategy for building the components of the Agency's ITM program while providing a stable foundation for making improvements on satisfying the Program Objectives over term of the contract;
- Recommendations for improving the Agency's ITM program from multiple dimensions (e.g., the scorecard, resources, processes, etc) and identifying synergies and relationships between policies, processes, strategies, etc. that offer opportunities for EPA to achieve breakthrough performance (e.g., strategies/approaches to better integrating the investment management process and EA process);
- The extent to which the Offeror's solution provides the most cost-effective strategy for achieving Program Objectives and the basis in research, fact and experience supporting the Offeror's approach;
- The types of innovations and processes the Offeror recommends for solving recurring business problems (e.g., converting the annual CPIC review process to an annual assessment);
- The Offeror's demonstration of its understanding of how to organize, and perform the

work, or deliver the services under the contract, based on a demonstrated understanding of Advice and Assistance Services versus tasks having defined products and/or deliverables;

- Offeror's proposed realistic and credible innovations for satisfying the Program Objectives in years 1, 2, and 3 of contract.

3.2 FACTOR 2: MANAGEMENT

The Management Factor is comprised of 2 Subfactors as described below.

3.2.1 Subfactor 1 – Personnel

3.2.1.1 Key Personnel

The Offeror's proposed Key Personnel will be evaluated for relevant experience in performing the tasks required by this solicitation. These tasks should have been performed under projects similar in function, scope, and complexity to the ITS-BISS requirements for Advisory and Assistance Services (AAS). The key personnel will be evaluated for the breadth, depth, and quality of relevant experience, results and effectiveness of their work in achieving goals in performance of projects of similar size and complexity to this project.

3.2.1.2 Technical Qualifications, Knowledge, Skills, and Certifications

The Offeror will be evaluated on its ability to provide personnel with the necessary skills for successful performance on this project. Examples of the qualifications and experience necessary include, but are not limited to:

1. policy/planning/governance
2. customer services
3. business transformation
4. management of IT consulting organizations
5. assessing ITM programs
6. building an IT consulting business
7. establishing business processes
8. supply chain management
9. operational elements of a fee-for-service organization.

The Offeror will be evaluated on how completely the Technical Qualifications, Knowledge, Skills, and Certifications proposed correlate to the functional areas described in section C.3.4 of the RFP.

3.2.2 Subfactor 2: Management Plans

The following Management Plans comprise the basic elements of this Subfactor.

3.2.2.1 Project Management Plan

The Offeror's PM approach will be evaluated for its completeness and understanding of EPA's project management environment and requirements, how well it addresses the planning and execution tracking, status, and reporting tasks that will provide the basis for successful management of the project.

3.2.2.2 Task Management Plan

The Offeror will be evaluated on how well the Offeror addresses its approach to perform task order management for this effort. This includes such items as planning the activities of its team(s), scheduling, organizing, and deploying resources, preparing task order proposals, controlling the execution of the task, monitoring progress, status reporting, resolving critical

issues, and planning for subsequent phases of work. Examples of elements the Government will consider in evaluating the Offeror's proposed Task Management Solution include:

- Planning for management of resources,
- Matching technical skills and knowledge with specific requirements of tasks,
- Monitoring progress against plans,
- Performing quality reviews of deliverables prior to delivery to the Government,
- Keeping the Government informed on a regular basis,
- Maintaining Quality Control for monitoring and oversight of work to ensure that it meets the Government's objectives and is accomplished in accordance with constraints,
- Turn-around capability for task order proposals.

3.2.2.3 Quality Assurance Surveillance Plan

Offerors will be evaluated on the extent to which their Quality Assurance Surveillance Plan (QASP) includes self-implementing approaches that make the Offeror responsible for monitoring its own performance without requiring Government intervention.

The Government will consider the following items in evaluating the Offeror's proposed QASP:

(1) Overall Approach

The adequacy, relevance, and reasonableness of the approach, procedures, documentation, and methods for tracking the proposed objectives, including communicating with the Government, handling corrective actions, and implementing improvements.

(2) Performance Standard

The completeness, clarity and relevancy of the proposed performance standards for meeting this project's objectives.

(3) Acceptable Level of Performance

The relevancy and quality of the quantifiable Acceptable Level of Performance for each Performance Standard as it relates to meeting EPA's objectives.

(4) Surveillance Methodology

The methods of surveillance adequately reflect the required skill sets, sampling criteria, and inspection/evaluation processes to ensure the acceptable quality levels are met.

(5) Incentives\Disincentives

The adequacy, reasonableness and appropriateness of the proposed incentive and disincentive metrics, granularity, scoring range, and weighting factors for each performance requirement as it relates to accomplishing the project's objectives.

3.2.2.4 Earned Value Management System

The Offeror's proposed Earned Value Management System (EVMS) will be evaluated for the following aspects:

(1) OMB Circular A-11 compliance.

(2) Adequacy as a tool for capturing and evaluating cost, schedule, and performance as the project progresses through implementation.

(3) The ability to produce monthly OMB compliant EV reports with full cost accounting

for cost of government resources.

(4) Establishing thresholds for cost and schedule variance that activate plans for corrective action and risk mitigation activity to resolve any identified problems.

(5) Capability of producing detailed schedules showing a critical path from the beginning of the contract through completed implementation for tracking project progress and status.

3.2.2.5 Subcontract Management Plan

Teaming and subcontracting arrangements will be evaluated based on the qualifications of teaming partners and subcontractors, and their responsibilities, clarity of assignments, and the adequacy of the proposed approaches, processes and responsibilities for teaming partner and subcontractor management. Emphasis will be placed on clarity of lines of authority and assignment and reporting procedures.

3.2.3 FACTOR 3: PAST PERFORMANCE

3.2.3.1 General Information

The Offeror will be evaluated on performance under existing and prior contracts of similar size, scope, and complexity as the ITS-BISS contract. The Government will focus on information that demonstrates quality of performance relative to the size and complexity of the procurement under consideration.

3.2.3.2 Awards and Certifications

The Offeror will be evaluated on past performance information provided concerning any quality awards or certifications that indicate the Offeror has a high quality process for developing and producing the products or services required by this acquisition. The currency, relevance, and trends of this past performance information will be considered.

3.2.3.3 Other Past Performance Information

References other than those identified by the Offeror may be contacted by the Government, with the information received used in the evaluation of the Offeror's past performance. EPA reserves the right to consider other information or sources at its disposal during the evaluation of the Past Performance Factor.

3.2.4 FACTOR 4: SMALL BUSINESS SUBCONTRACTING (Full & Open)

The Offeror's Small Business Participation Proposal shall be evaluated using the following criteria:

1. The extent that the plan meets the requirements specified in the FAR.
2. The extent of participation of small, small disadvantaged businesses in terms of the value of the total acquisition.
3. The complexity and variety of the work small firms are to perform and the extent to which, such firms are specifically identified in the proposal.
4. Past performance in subcontracting with small business.
5. The extent to which an Offeror identifies, commits to the use of, and demonstrates success of EPA's Procurement Preference Program Goals to include the following:
 - Small – 50%
 - Small Disadvantaged – 20%
 - Women-Owned Small Business – 7.5%
 - HUBZone Small Business – 3%

- ### 3.2.5 FACTOR 5: COST/PRICE-RELATED

The Offeror's price proposal will be evaluated for the following criteria:

- #### 4.0 EVALUATION OF PROPOSED INCENTIVES / DISINCENTIVES

This contract may include incentives/disincentives. As a result, Offerors are required to provide information on proposed incentives/disincentives in both the Technical/Management proposal and Price proposal. Offerors' proposed Quality Assurance Surveillance Plan (with its incentives and disincentives) will be evaluated based on how well it meets EPA's Statement of Objectives. If the incentives/disincentives included in the Offeror's proposal are acceptable, pricing for the incentives/disincentives will be evaluated as part of the overall price. If the incentives/disincentives included in the Offeror's proposal are not acceptable, pricing for these incentive/disincentive fees will not be evaluated as part of the overall price.